

## Personnel Action Entry Procedures

### CHANGES to FULL- OR PART-TIME STATUS – INCREASE OR DECREASE IN HOURS - Standard Hours/Full Time Equivalent (FTE) Support Document

Friday after payday is first day to enter records for next pay period (pay period begin Sunday).

Unless otherwise notified, deadline for HCM record entry is Tuesday of a pay week at 4:25 p.m.

Standard Hours reflects the number of hours an employee is scheduled to work in a week.

Full-time equivalency (FTE) is the percentage of full time that an employee should normally work in a job. In calculating the FTE, the system uses the definition of the standard hours and the standard work period.

**NOTE:** the effective date of any change made to a position number **MUST** be the first day of a pay period and **MUST** either match or pre-date the movement of the person into the position.

Begin by navigating to **Organizational Development> Position Management> Maintain Positions/Budgets> Add/Update Position Info.** In the Find an Existing Value tab, enter the position number you will be reallocating, include history and hit search.

#### On the Description page

- Click “+” to insert a new row
- Enter Effective Date (must be the first day of a pay period and **MUST** match the date of the employee’s change in standard hours)
- Tab to Reason and choose STA
- ✓ Ensure the three fields indicating full or part-time status accurately reflect the schedule this employee will work – **for example:** an employee working 20 hours per week would have an FTE of .50, standard hours of 20 and the status would be part-time. However, in a job share situation the position would appear as full-time and each employee would appear as part-time in their specific Job Data records.

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- ✓ Also ensure the Adds to FTE Actual Count box is checked on the Specific Information request. The FTE box is checked whether the position is full or part-time.

The screenshot shows the 'Add/Update Position Info' form in a web browser. The form is divided into several sections: Position Information, Job Information, and Work Location. The 'Specific Information' tab is selected, showing details for Position Number 740002. The 'Effective Date' is 06/13/2004, and the 'Status' is Active. The 'Reason' is XFR (Transfer Location Change GUC) with an 'Action Date' of 06/12/2004. The 'Position Status' is Approved, and the 'Status Date' is 06/13/2004. The 'Key Position' checkbox is unchecked. The 'Job Information' section includes 'Business Unit' (STATE), 'Manager Level' (Non-Manager), 'Job Code' (027100), 'Barg Unit' (01), 'Mgt Level' (N), 'OT Category' (18), 'Reg/Temp' (Classified), 'Pos Type' (01), 'Temp Type' (blank), 'Full/Part Time' (Full-Time), 'Benefit Program' (VT), 'Regular Shift' (N/A), 'LimExp Dt' (blank), 'Union Code' (blank), 'Title' (Public Health Analyst III), and 'Short Title' (Public Hea). The 'Work Location' section shows 'Reg Region' (USA), 'Department' (74306), 'Company' (VT), and 'Location' (05401). The form is displayed in a web browser window titled 'Add/Update Position Info - Windows Internet Explorer'.

- Change Full/Part Time: field if necessary
- At the bottom of this page, change Standard Hours filed to the number of hour to be worked by the employee per week

On the Specific Information page

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Near the bottom of the page, click on the Education and Government dropdown section

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Menu

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Description | Specific Information | Budget and Incumbents

Position Number: 740002  
Headcount Status: Filled  
Current Head Count: 1 out of 1

Specific Information Find | View All First 1 of 1 Last

Effective Date: 06/13/2004 Status: Active

Job Profile ID:   
Max Head Count: 1  
Mail Drop ID:   
Work Phone:   
Health Certificate:   
Signature Authority:

Incumbents

- ☐ Update Incumbents
- ☐ Include Salary Plan/Grade
- ☒ Budgeted Position
- ☐ Confidential Position
- ☐ Job Sharing Permitted

Education and Government

Position Pool ID:   
\*Pre-Encumbrance Indicator: Immediate  
\*Encumber Salary Option: Salary Step  
\*Classified Indicator: Classified  
Calc Group (Flex Service):   
Academic Rank:   
FTE: 1.000000 ☒ Add to FTE Actual Count

US Federal

Change FTE field to the correct % (e.g., if an employee works 32 hours per week perform the following calculation to determine the FTE:  $32 \text{ hours} / 40 = .80$ , so the FTE would be .80)

Here are some additional calculations

10 hrs. = .250 FTE

12 hrs. = .300 FTE

16 hrs. = .400 FTE

20 hrs. = .500 FTE

24 hrs. = .600 FTE

25 hrs. = .625 FTE

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30 hrs. = .750 FTE

32 hrs. = .800 FTE

36 hrs. = .900 FTE

### SAVE

Now that you've updated the position, you'll want to process the change in the employee's record. Navigate to **Workforce Administration > Job Information > Job Data** and enter the Emp ID, and search.

This will take you to the **Work Location Page**. Once there, add a record by clicking the plus (+) sign on the right side of the page.

- Enter the effective date of the standard hours change (MUST be the first day of a pay period - Sunday)

Tab to Action and choose Standard Hours Change

Tab to Reason and choose SHR – Standard Hours Change

Click on the Override Position Data button so it reads Use Position Data. You will notice that this opens many fields in Job Data. It will also update your position data as it will populate Job Data with the updated information you just entered into Position Management.

Now, click the Use Position Data button so it reads Override Position Data again.

This will close the fields in Job Data and also update additional information from Position Management (specifically the step date – which in most cases will not be accurate for this employee). We will update the step information later in this document.

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### On the Job Information page

- Verify that new information populated (Full/Part, Standard Hours and FTE fields should have changed from previous record)
- Enter Work Schedule (121 or 699) – depending on this employee's FTE change
- Verify/change daily hour limit
- Verify Job Code

The screenshot displays the PeopleSoft Job Information page. The left-hand menu includes options such as 'My Favorites', 'Recruiting', 'Assigned Recruiter Activities', 'Job Requisitions/Postings', 'Identify/Process Applicants', 'Interview Applicants', 'Hire Applicants', 'Reports', 'Workforce Administration', 'Benefits', 'North American Payroll', 'Organizational Development', 'Enterprise Learning', 'Workforce Monitoring', 'Set Up HRMS', 'Tree Manager', 'Reporting Tools', 'PeopleTools', 'Change My Password', 'My Personalizations', and 'My System Profile'. The main content area is titled 'Job Information' and contains various fields for employee data. Key fields include 'Effective Date' (07/12/2007), 'Effective Sequence' (0), 'Job Indicator' (Primary Job), 'Action / Reason' (Hire), 'Job Code' (091000), 'Supervisor Level', 'Regular/Temporary' (Classified), 'Empl Class', 'Regular Shift' (N/A), 'Standard Hours' (40.00), 'Work Period' (W), 'Contract Number', 'Contract Type', 'Provisional Status' (N), 'Permanent Status' (Y), 'Work Schedule' (699), 'Daily Hour Limit' (10.00), 'FLSA Status' (Nonexempt), 'EEO Class' (None), and 'Work Day Hours'. The page also features a 'Save' button and a 'Previous tab' button at the bottom.

### On the Job Fields (VT) page

- Delete any previous comments
- Enter any new comments (example: increase/decrease in standard hours and FTE)

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### On the Payroll page

- Verify Management Level, Bargaining Unit, OT category – there should be no change from previous record.
- If this employee is not working a full week or a full year you will want to choose the appropriate status from the dropdown menu on the Parttime field.

FP	Full Time / Part Year
PF	Part Time / Full Year
PP	Part Time / Part Year

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Menu

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Applicant | Work Location | Job Fields (VT) | Job Information | Payroll | Salary Plan | Compensation

EmplID: NEW Empl Rcd#: 0

Payroll Info

Effective Date: 07/11/2007 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Hire

\*Payroll System: Payroll for North America

Payroll for North America

Pay Group: 33D Department of Public Safety Holiday Schedule: NONE

Employee Type: H Hourly

Tax Location Code: GL Pay Type: FICA Status: Subject

Account Code: Management Level: N Non-Manage Pay Code: A Position Type: 01 Non-Manage OT Category: 11

\*Barg Unit: 01 Parttime: Temp Type:

Personal Data | Job Data | Employment Data | Benefits Program Participation

Save Previous tab Next tab Refresh

Applicant | Work Location | Job Fields (VT) | Job Information | Payroll | Salary Plan | Compensation

**NOTE:** if the Use Position Data button was showing when you started this entry, there may have been an overtime category change that you'll need to check.

Review the previous record by clicking on the blue arrow located in the upper right-hand corner of the Work Location page. If the overtime category is specific to the

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employee (example: 37 or 38), you will want to return to the first record by clicking on the arrow again, move back to the Work Location page and open the fields again by clicking on Use Position Data. Return to the Payroll panel and enter the overtime category that was in this employee's previous record.

### **On the Salary Plan page**

- Verify Paygrade

You will note here that the step information has updated to match the information in Position Data – usually step 1. Similar to the NOTE above, you should review the previous record to verify accuracy.

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### On the Compensation page

- Verify hourly rate – review previous record if necessary to ensure accuracy of rate.
- Verify hourly rate in Comp Rate field at the bottom of the page matches the pay grade and step you've entered on the previous page.

Click the yellow Calculate Compensation button and verify the rate at the top of the page matches the rate at the bottom.

Screen shot on following page.

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Home | Add to Favorites | Sign out

New Window | Help |

Applicant | Work Location | Job Fields (VT) | Job Information | Payroll | Salary Plan | Compensation

EmplID: NEW Empl Rcd#: 0

Find First 1 of 1 Last

Compensation

Effective Date: 07/11/2007 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Hire

Current

Compensation Rate: 15.660000 \*Frequency: H Hourly

Comparative Information

Pay Rates

Default Pay Components

Pay Components

Customize Find First 1 of 1 Last

Amounts	Changes	Conversion				
*Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Percent
1 NAHRLY	0	Details	15.660000	USD	H	

Calculate Compensation

Personal Data | Job Data | Employment Data | Benefits Program Participation

Save Previous tab Next tab Refresh

Applicant | Work Location | Job Fields (VT) | Job Information | Payroll | Salary Plan | Compensation

Trusted sites 100%

SAVE



## **Personnel Action Entry Procedures**

This information is intended to provide general information, and to demystify some of the technical procedures. Again, this is an overview. Individual situation will vary. It is important to read bargaining unit and policy language and/or to contact the Department of Human Resources with questions concerning the specifics of your situation.

**Unless otherwise notified, deadline for HCM record entry is Tuesday of a pay week at 4:25 p.m.**

**NO data entry of records by field staff after deadline without prior approval from HRIS.**

**Friday after payday is first day to enter records for next pay period (Sunday).**